

# Go West Summit 2024

FEBRUARY 26–29, 2024

LAKE TAHOE  
NEVADA



**Marcela Lizarraga**  
WTTC  
Regional Director The Americas  
& Special Projects

26 Feb 2024

Strategic  
Partners:



GLOBAL **+rescue**



wttc.org



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@wtandtc



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# Authorities in Travel & Tourism

## Private Sector



**180 Members**

## Public Sector



**160 Member states**



# THE AUTHORITY ON TRAVEL & TOURISM

## *The Council Representing the Global Travel & Tourism Private Sector*

For **30 years** we have been  
quantifying the impact of Travel &  
Tourism in **185 countries** in our  
Research

What we aim to highlight through our  
Research:

- **Economic value** of Travel & Tourism
- **Fair economic policies** for the sector
- Long-term, **sustainable growth**



# WTTC Members

WTTC Executive Committee

Members 170+ (Presidents, Chairs and CEOs) | All geographies | All industries in Travel & Tourism

Airports

Airlines

Cruise

Destinations

Tour Operators

Travel Companies

OTAs

GDS

Car Rental

Hotels

Digital Players

Travel Services



**Certares**  
Greg O'Hara  
Founder &  
Managing Director



**Virtuoso**  
Matthew Upchurch  
President & CEO



**Microsoft**  
Julie Shainock  
Global Managing Director



**Iberostar**  
Gloria Fluxà  
Vice Chair & CSO



**Visit California**  
Caroline Beteta  
President & CEO



**VISA**  
Jeni Mundy  
SVP, Global Head of  
Merchant Sales &  
Acquiring



**Expedia Group**  
Ariane Gorin  
President, Expedia for  
Business



**JP Morgan Chase Co.**  
Allison Beer  
CEO Card Services &  
Connected Commerce



**American Express**  
Audrey Hendley  
President, Global Travel  
& Lifestyle Services



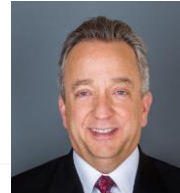
**IBM**  
Dee Waddell  
Global Managing  
Director, IBM Travel  
and Transportation  
Industry



**MSC Cruises**  
Perfrancesco Vago  
Executive Chairman



**Marriott Int'l.**  
Anthony Capuano  
CEO



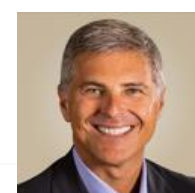
**JLL**  
Dan Fenton  
Executive VP &  
Global Tourism  
Director



**Google Inc**  
Nelson Boyce  
Managing Director,  
Travel



**Abercrombie &  
Kent Travel Group**  
Manfredi Lefebvre  
Chairman



**HILTON**  
Christopher J Nassetta  
President & CEO



**Intrepid Travel**  
James Thornton  
CEO



**Palace Resorts**  
Gibran Chapur  
Executive VP









# Membership Snapshot



|                              | AVIATION     | HOTELS/LODGING   | CRUISE               | TECHNOLOGY & INVESTMENT              | TRAVEL AGENCIES & TOUR OPERATORS | DESTINATIONS & ASSOCIATIONS                              | OTHER  |
|------------------------------|--------------|--|----------------------|--------------------------------------|----------------------------------|--|--|
| EUROPE<br>MID EAST<br>AFRICA | <br><br><br> | <br><br><br><br><br><br><br><br><br><br>                     | <br><br><br>         | <br><br><br><br><br><br><br><br><br> | <br><br><br><br><br><br><br><br> | <br><br><br><br><br><br><br><br><br><br><br><br><br><br> | <br><br><br><br><br><br><br><br><br><br><br>             |
| AMERICAS                     | <br><br><br> | <br><br><br><br><br><br><br><br><br><br><br><br><br><br><br> | <br><br><br><br><br> | <br><br><br><br><br><br><br><br><br> | <br><br><br><br><br><br><br><br> | <br><br><br><br><br><br><br><br><br><br><br><br><br>     | <br><br><br><br><br><br><br><br><br><br><br><br><br><br> |
| APAC                         | <br><br>     | <br><br><br><br><br><br><br>                                 |                      | <br><br><br><br><br><br><br>         | <br><br><br>                     | <br>   | <br><br><br><br><br>                                     |

# Membership Snapshot

## North America

| AVIATION  | HOTELS/LODGING  | CRUISE  | TECHNOLOGY & INVESTMENT  | TRAVEL AGENCIES & TOUR OPERATORS   | DESTINATIONS & ASSOCIATIONS   | OTHER  |
|---|---|---|--|--|---|--|
| <br><br> | <br><br><br><br><br><br><br> | <br><br><br><br> |  <br> <br> <br> <br>  | <br><br><br><br><br><br> <br><br> | <br><br><br> <br><br> |  <br><br><br><br><br> <br> <br>  |



# WTTC Strategic Framework



*Sector*  
**VALUE**  
*Amplify Value of T&T*

- Economic Impact data
- T&T at top of Agenda
- Segment diversification
- Member engagement
- Partnerships
- Advocacy
- SME network



*Support the*  
**GROWTH**  
*of the sector*

- Unique network for commercial opportunities
- Frictionless travel
- Technology & innovation
- Foster investment
- Training & Education
- Crisis management



*Promote a*  
**SUSTAINABLE**  
*sector*

## Climate & Environment

- **Environmental & social data\***
- Hotel Sustainability Basics
- Nature Positive T&T
- ESG regulation
- **Social Impact**
- Diversity, Equity & Inclusion
- Future of Work



# WTTC Reach

**+100BN**

WTTC Global Reach

**600K**

Website



**209,375**

**115,135**



**100,231**



**17,622**



**4,870**

**447,233**

Total

**4.5**

**million\***

Total Impressions



**650K**

Video Views



# Amplifying T&T Sector Value

## ECONOMIC IMPACT REPORT



# How Money Travels

## DIRECT

### Travellers pay directly to...

Airlines, coach, rental car, train, cruise lines, travel agents, hotels, convention centres, restaurants, shopping centres, sports arenas, entertainment, theatre, recreation etc.

## INDIRECT

### These are supplied by...

outside goods and services such as marketing and PR, cleaning and maintenance, energy providers, catering and food production, design and print etc.

## JOBS

### These are supplied by...

which pay salaries, wages, profits and taxes

## INDUCED

### Which pay into...

infrastructure, agriculture, technology, real estate, communications, education, banks, healthcare and more.



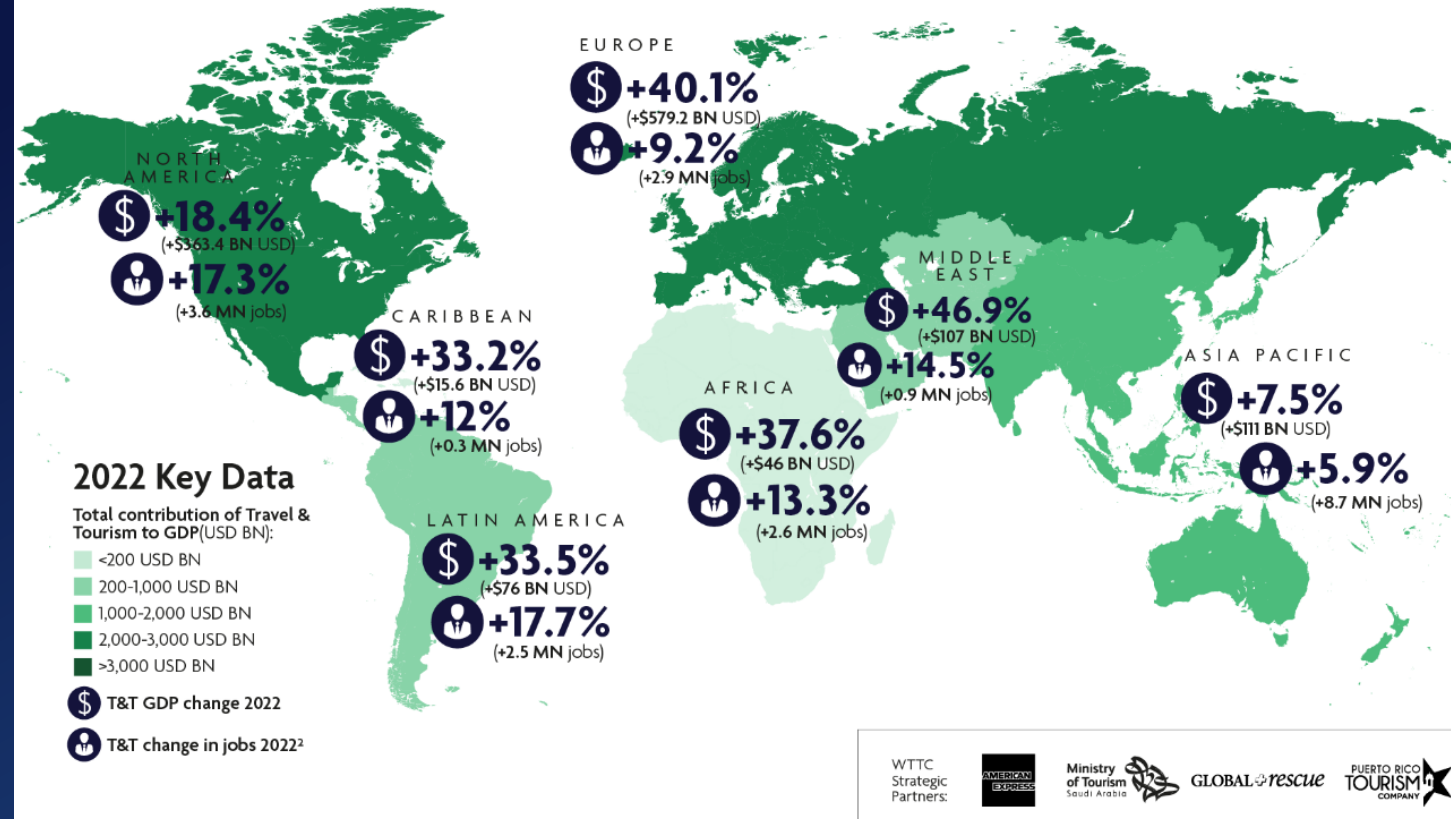


# WTTC Data

## Outputs of the EIR model

## TRAVEL & TOURISM: ECONOMIC IMPACT 2023<sup>1</sup>

1. All values are in constant 2022 prices & exchange rates. As reported in March 2023  
2. Where the country or region has implemented job support schemes and supported jobs are still recorded as employment by national statistical authorities, job losses exclude those supported jobs (where known)



*All data includes time series from 1995 and ten-year forecasts consistent with global economic outlook.*

## T&T Direct & Total GDP

- Growth trends
- Share of economy

## T&T Direct & Total Employment

- Growth trends
- Share of economy

## Also

- International visitor spending
- Domestic spending
- Business & leisure spending
- Government spending
- T&T investment

# Global Economic Impact Report

## Results 2022 vs 2019





# Global EIR Results – Looking Ahead

**2023**  
Forecast

**\$9.5TN**

  
**Total  
GDP**

**\$15.5TN**

**2033**  
Forecast

**320MN**

  
**Total  
Jobs**

**430MN**

**International**  
**\$1.4TN**

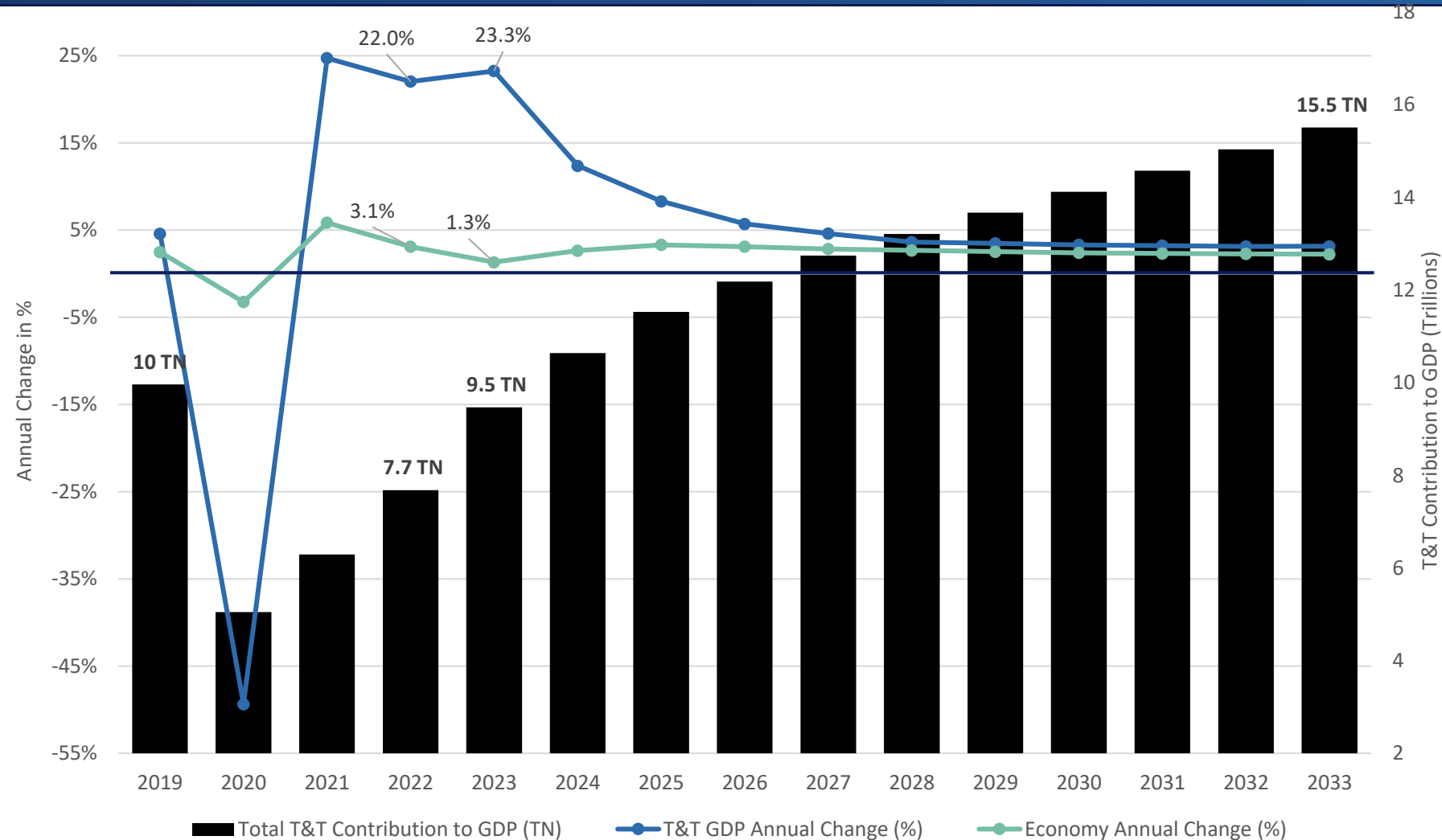
**Domestic**  
**\$4.7TN**

  
**Visitor  
Spend**

**International**  
**\$2.6TN**

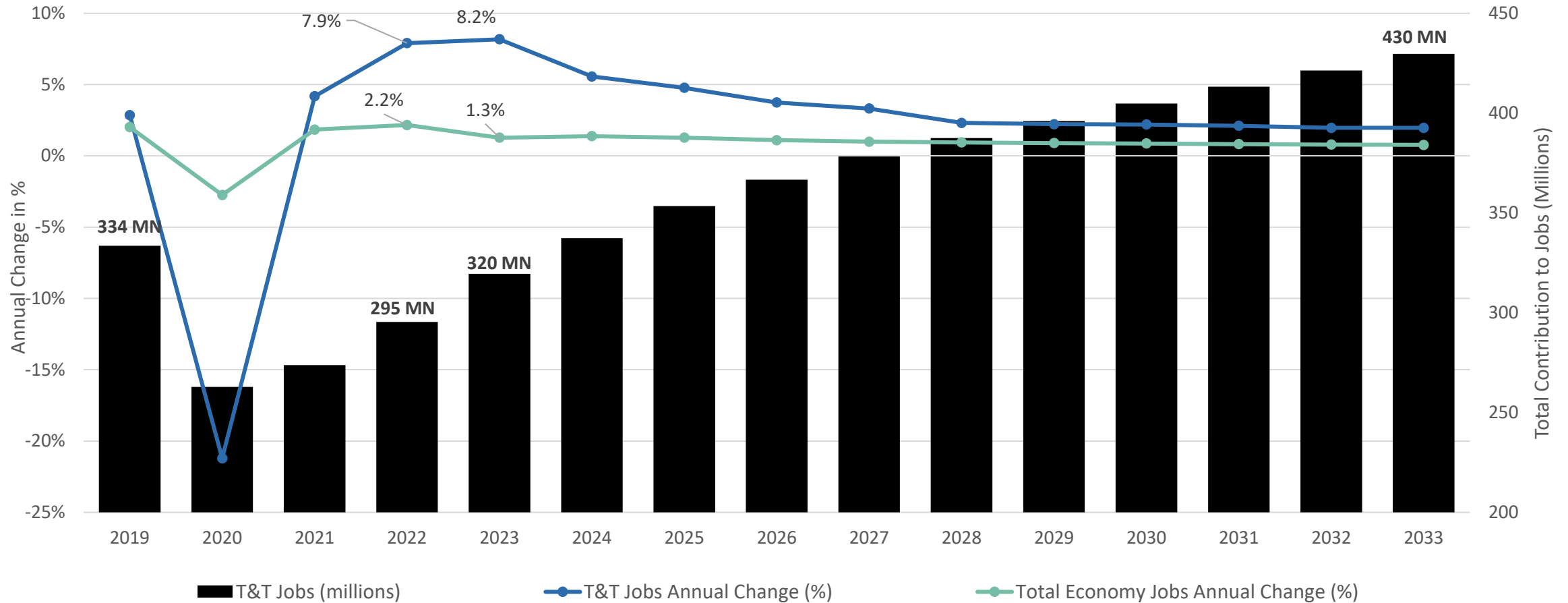
**Domestic**  
**\$7.2TN**

# Global Economic Impact Timeline: 2019 – 2033 Total T&T Contribution to GDP





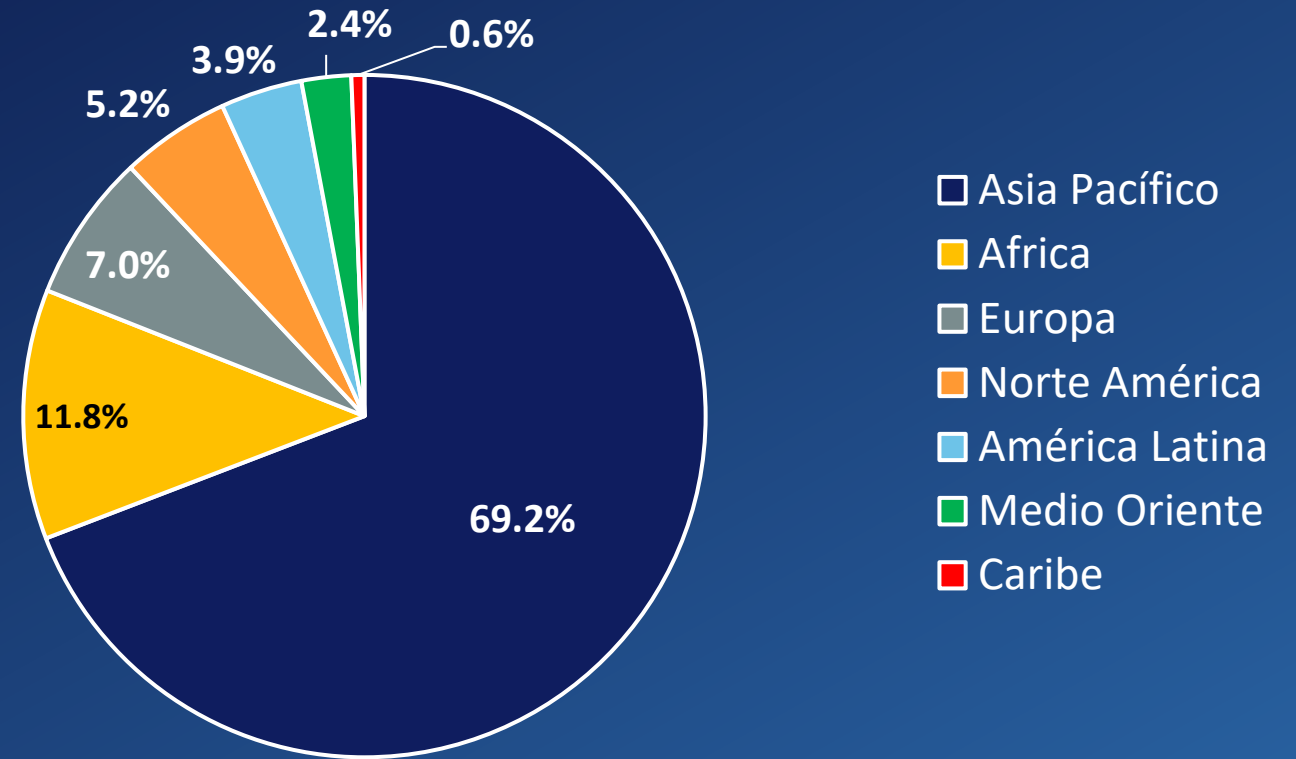
# Global Economic Impact Timeline: 2019 – 2033 Total T&T Contribution to Jobs



# T&T's Forecasted Job Growth 2023-2033

## Economic Impact Research

Our sector is  
forecasted to create  
110 million new jobs  
across the next  
decade



% of new T&T jobs by Region



# Economic Impact 2022

NORTH AMERICA

**\$2.3 TN**  
**8.1% GDP**

**24.70 MN**  
**10.5%**



**Total GDP**



**Total Jobs**

U.S.

**\$2.0TN**  
**7.9% GDP**

**16.2MN**  
**10.2%**

# T&T Contribution to GDP 2022

## G20 Countries

|                  | T&T contribution to GDP 2022 (US\$ BN) | T&T % of GDP 2022 | T&T GDP change 2022 (% YOY) | Share of Total T&T Spending 2022 |               | T&T Spending Change 2022 (% year on year) |               |
|------------------|--|-------------------|-----------------------------|----------------------------------|---------------|---|---------------|
|                  |  |                   |                             | Domestic                         | International | Domestic                                  | International |
| 1 United States  | 2,018.3                                | 7.9%              | 16.9%                       | 91.1%                            | 8.9%          | 12.8%                                     | 158.2%        |
| 2 China          | 582.8                                  | 3.3%              | -29.5%                      | 90.9%                            | 9.1%          | -33.1%                                    | -8.5%         |
| 3 Germany        | 353.1                                  | 8.8%              | 43.4%                       | 90.9%                            | 9.1%          | 49.1%                                     | 60.9%         |
| 4 United Kingdom | 290.8                                  | 9.5%              | 65.2%                       | 84.7%                            | 15.3%         | 55.1%                                     | 307.0%        |
| 5 Japan          | 257.3                                  | 6.2%              | 50.5%                       | 98.6%                            | 1.4%          | 61.6%                                     | -31.3%        |
| 6 France         | 225.7                                  | 8.2%              | 36.9%                       | 68.1%                            | 31.9%         | 26.7%                                     | 75.9%         |
| 7 Mexico         | 214.6                                  | 14.7%             | 23.0%                       | 84.8%                            | 15.2%         | 22.2%                                     | 31.2%         |
| 8 Italy          | 202.7                                  | 10.2%             | 33.4%                       | 72.7%                            | 27.3%         | 19.6%                                     | 99.3%         |
| 9 India          | 199.6                                  | 5.9%              | 89.2%                       | 88.4%                            | 11.6%         | 85.5%                                     | 125.1%        |
| 10 Spain*        | 186.6                                  | 13.6%             | 44.7%                       | 46.6%                            | 53.4%         | 9.2%                                      | 122.6%        |
| 11 Brazil        | 140.9                                  | 7.6%              | 22.7%                       | 95.1%                            | 4.9%          | 25.0%                                     | 50.5%         |
| 12 Australia     | 115.5                                  | 6.9%              | 8.6%                        | 95.7%                            | 4.3%          | 12.9%                                     | 29.9%         |
| 13 Canada        | 106.2                                  | 5.0%              | 41.4%                       | 78.4%                            | 21.6%         | 45.1%                                     | 63.7%         |
| 14 Türkiye       | 102.5                                  | 11.5%             | 50.5%                       | 31.3%                            | 68.7%         | 39.0%                                     | 64.8%         |
| 15 Saudi Arabia  | 85.0                                   | 8.4%              | 58.2%                       | 48.6%                            | 51.4%         | 38.8%                                     | 526.1%        |
| 16 Russia        | 75.0                                   | 3.6%              | -1.8%                       | 87.6%                            | 12.4%         | 1.0%                                      | -2.7%         |
| 17 South Korea   | 59.4                                   | 3.6%              | 30.0%                       | 66.3%                            | 33.7%         | 33.3%                                     | 47.6%         |
| 18 Indonesia     | 52.0                                   | 3.9%              | 59.0%                       | 74.3%                            | 25.7%         | 50.0%                                     | 1125.3%       |
| 19 Argentina     | 50.0                                   | 8.0%              | 39.0%                       | 90.3%                            | 9.7%          | 31.2%                                     | 898.6%        |
| 20 South Africa  | 25.8                                   | 6.3%              | 48.7%                       | 76.9%                            | 23.1%         | 37.6%                                     | 166.8%        |

\* Spain is included here as it is invited to G20 events as a permanent guest.



# Economic Impact Report - NORTH AMERICA

## Forecast 2023 - 2033



**2023**

**\$2.6TN**  
8.9%



**Total  
GDP**

**\$3.5TN**  
10.2%

**2033**

**26.13MN**  
11.1%



**Total  
Jobs**

**31.66MN**  
12.6%

**T&T vs Economy GDP Growth**

**World = 5.1% vs 2.6%**

**North America = 3.1% vs 1.7%**

# U.S. EIR Results – Looking Ahead

**2023**  
Forecast

**\$2.2TN**  
+11.1%



**Total  
GDP**

**2033**  
Forecast

**\$3TN**

**17.4MN**



**Total  
Jobs**

**20.8MN**

**International**  
**\$148BN**

**Domestic**  
**\$1.3TN**



**Visitor  
Spend**

**International**  
**\$270.6BN**

**Domestic**  
**\$1.7TN**



# TRENDS AND CHALLENGES



# A World in Motion:

## Shifting consumer travel trends in 2022 and beyond

- Influence of social media on travellers' decision making
- A return to the pre-pandemic favourites - cities and beach holidays
- An increased tendency towards 'blended' trips
- Interest in sustainable travel remains strong
- The desire for flexible booking policies and payment options
- Travel intention remains strong – leisure travel spending's share of consumer wallet remains unchanged despite high inflation (Deloitte)



# What is the biggest challenge facing Travel & Tourism?

**ECONOMIC  
OUTLOOK**

**CAPACITY  
CONSTRAINTS  
& STAFF  
SHORTAGES**

**TECHNOLOGY  
REVOLUTION**

**ANOTHER  
PANDEMIC**

**CLIMATE CRISIS**



# REGIONAL CHALLENGES

| Challenge                   | Europe | USA & Canada | Middle East | Africa | China | Asia Pacific | Latin America & Caribbean |
|-----------------------------|--------|--------------|-------------|--------|-------|--------------|---------------------------|
| Visas & Borders             | ✓      | ✓            | ✓           | ✓      | ✓     | ✓            | ✓                         |
| Aviation & Connectivity     | ✓      | ✓            | ✓           | ✓      | ✓     |              | ✓                         |
| Personnel and Training      | ✓      | ✓            |             | ✓      |       | ✓            | ✓                         |
| Geo-Political Environment   | ✓      | ✓            | ✓           | ✓      | ✓     |              | ✓                         |
| Infrastructure & Investment | ✓      |              |             | ✓      |       | ✓            | ✓                         |
| Data Protection             | ✓      | ✓            | ✓           |        |       |              |                           |
| Security and Perception     |        |              |             | ✓      | ✓     |              | ✓                         |
| Competitiveness             | ✓      | ✓            | ✓           | ✓      | ✓     | ✓            | ✓                         |



# A More Sustainable Sector...

## REPORTS AND INITIATIVES



# ENVIRONMENTAL & SOCIAL REPORTING

**Building on WTTC's economic impact research**, revealing T&T's environmental and social footprints.  
**Evidence for sustainability** & the sector's progress on the SDGs

*Example of indicators:*



## #Economic

- GDP contribution
- Employment

Goal: with sub-sector breakdowns



## #Environment #Climate

- **GHG emissions**  
Scope 1-3 included and int. transport
- Water footprint
- Energy source
- Air pollution
- Resource input



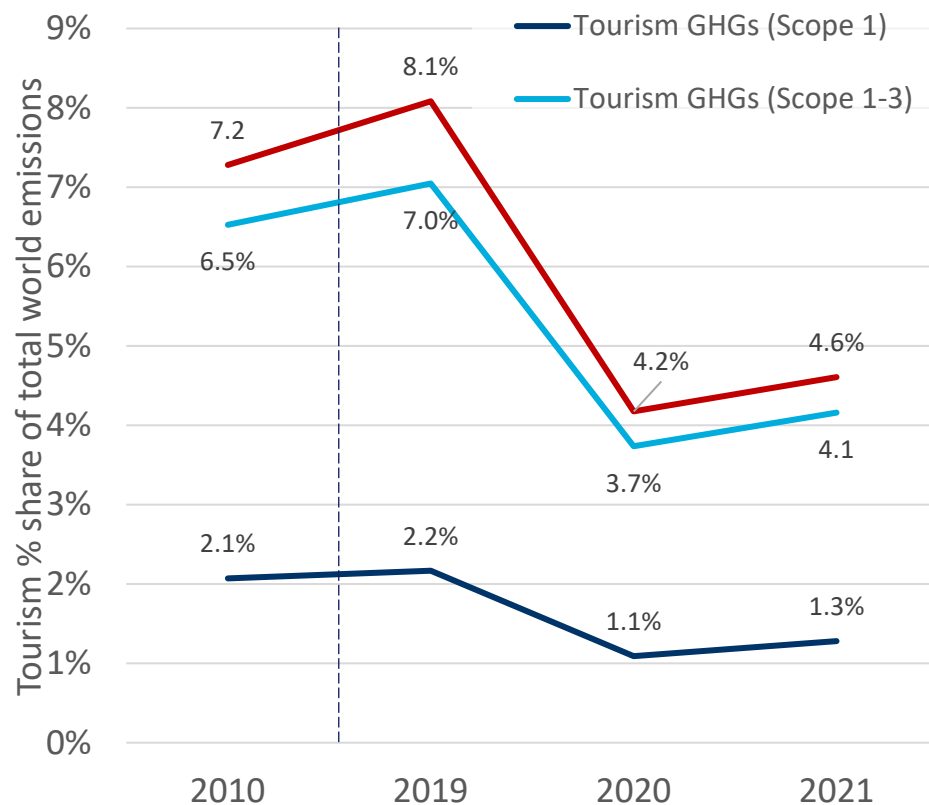
## #Social

- **Employment**  
(wage, age, gender)
- Tourism supported jobs

**185 countries** (global and regional) for 2010, 2019, 2020 and 2021

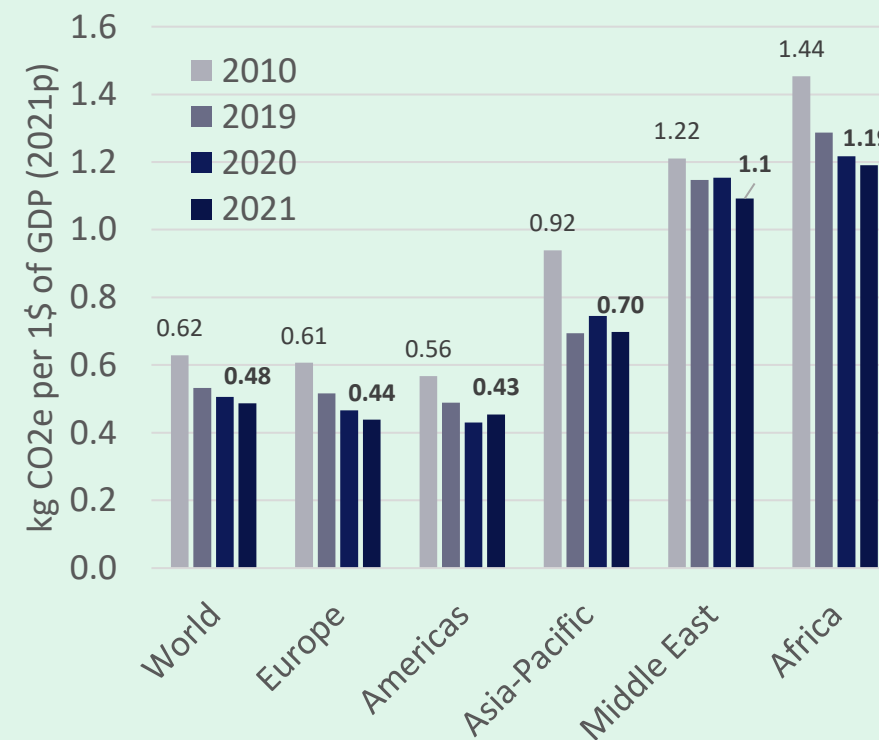
# T&T's Climate Footprint

## Global T&T GHG Emissions 2019



**8.1% of total  
world emissions**

## Average annual growth 2010-19



T&T GDP  
growth

**4.3%**

vs

T&T GHG  
footprint growth

**2.5%**

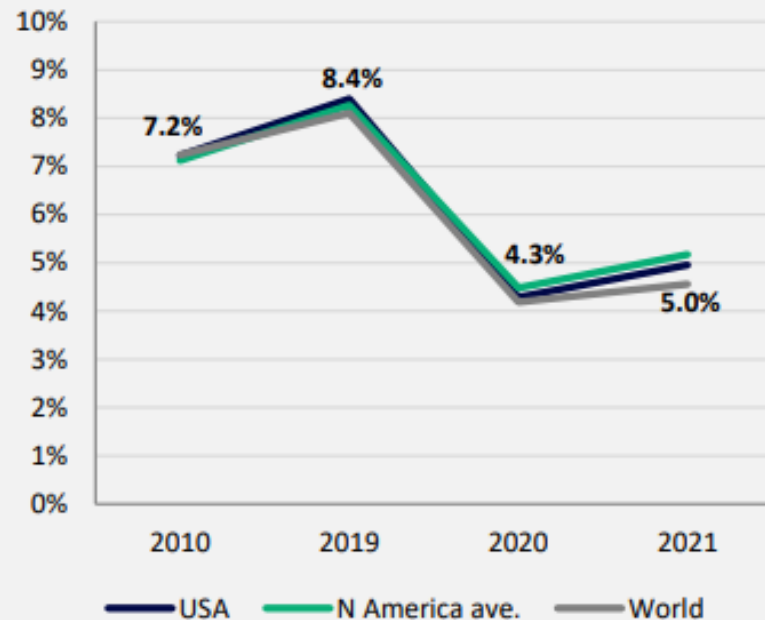


# Environmental Impact

## US & World

### TRAVEL & TOURISM'S CONTRIBUTION TO TOTAL GREENHOUSE GAS EMISSIONS

% OF TOTAL GHG EMISSIONS



### Decoupling of economic growth from environmental impact

#### AVERAGE ANNUAL GROWTH FROM 2010 TO 2019

TRAVEL & TOURISM GDP

3.0%

USA

3.1%

N America ave.

4.3%

World

#### GHG EMISSIONS LINKED TO TRAVEL & TOURISM

1.2%

USA

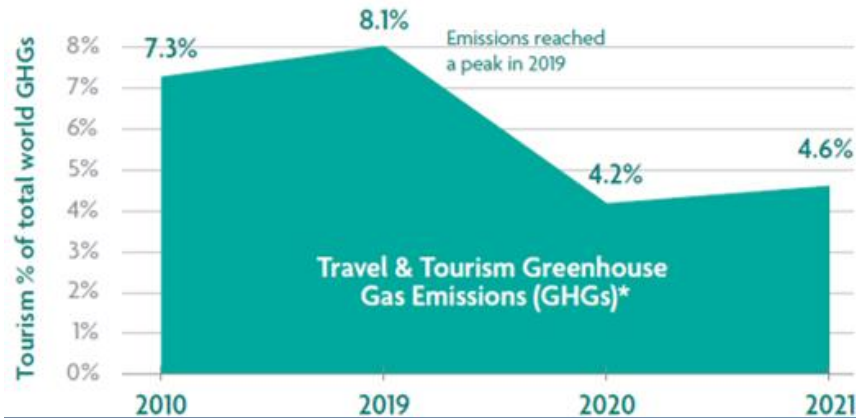
1.2%

N America ave.

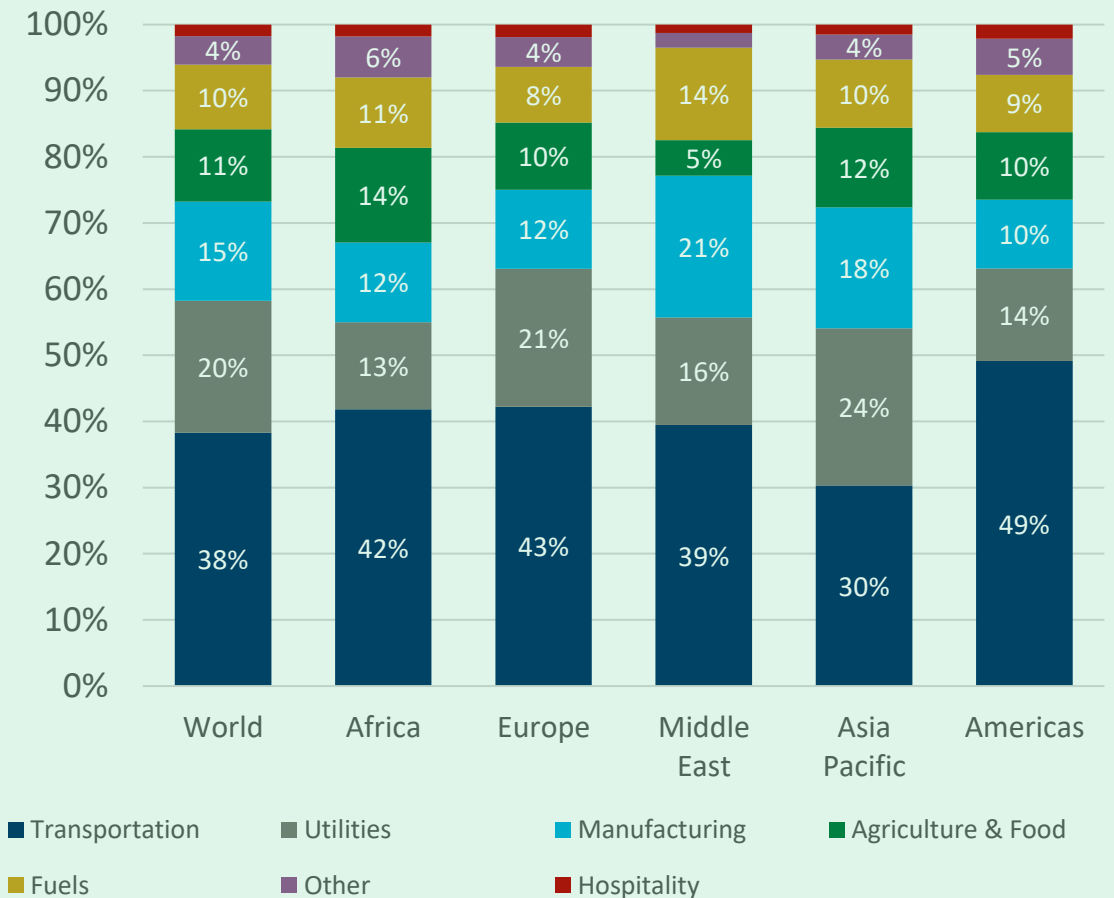
2.5%

World

# T&T Sub-Sector Emissions (2019)

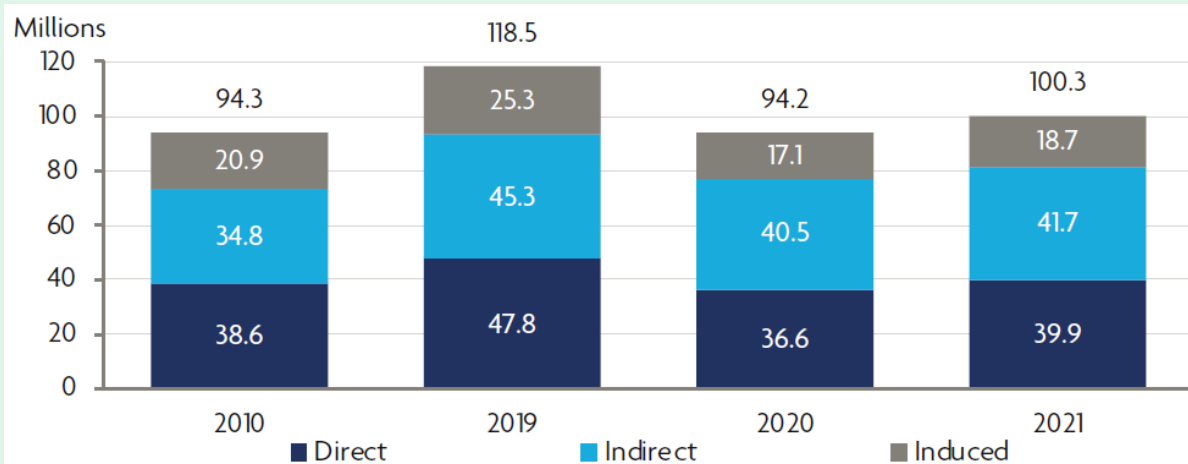


2010-2019:  
**4.3%**  
T&T GDP average  
annual growth  
vs  
**2.4%**  
T&T GHG  
footprint average  
annual growth

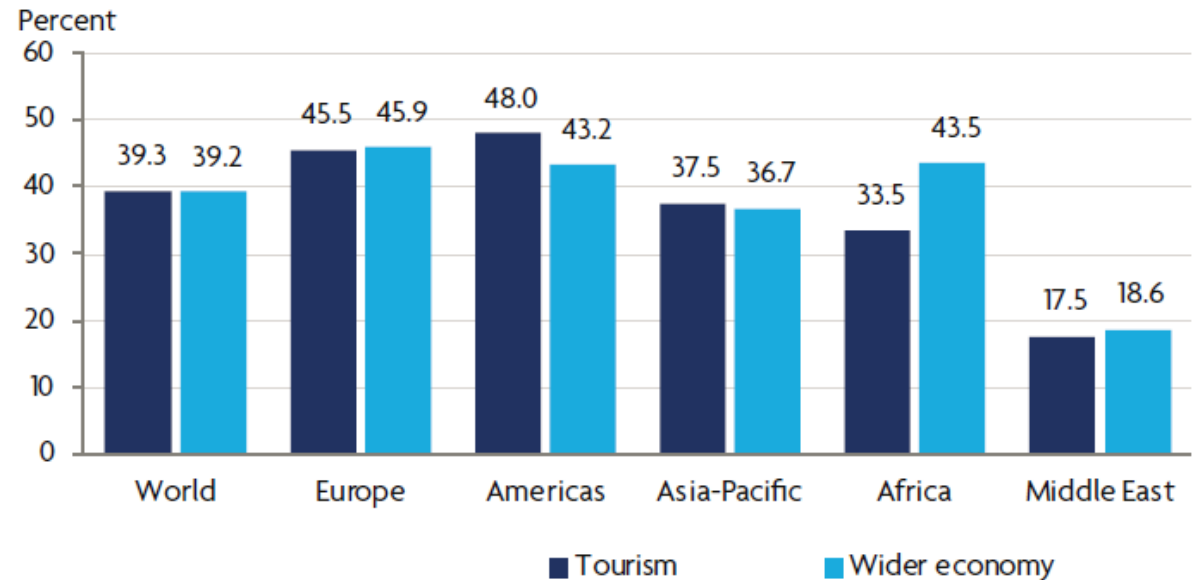


# Women Employed in T&T

**Total global female employment supported by Travel & Tourism, by type of impact and year**



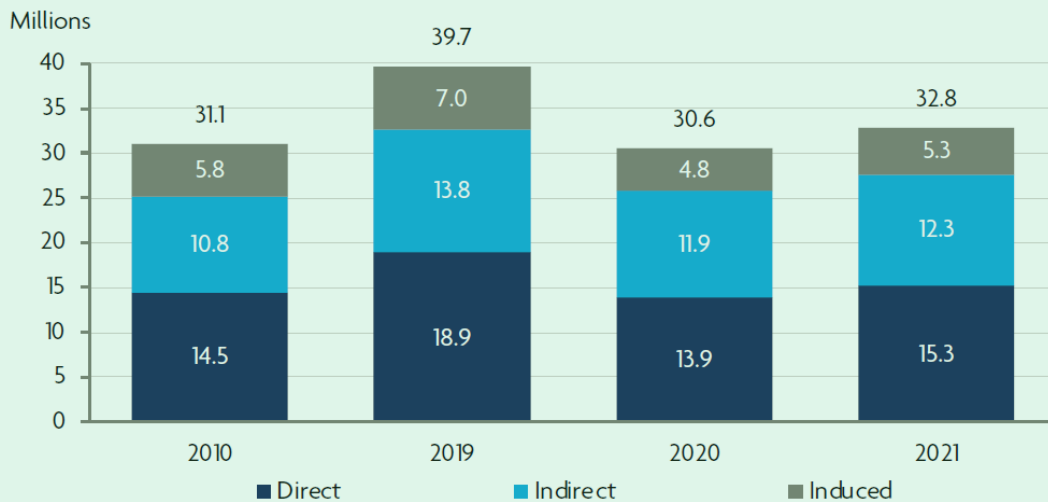
**Female share of direct employment in T&T and in the overall economy, by region, 2021**



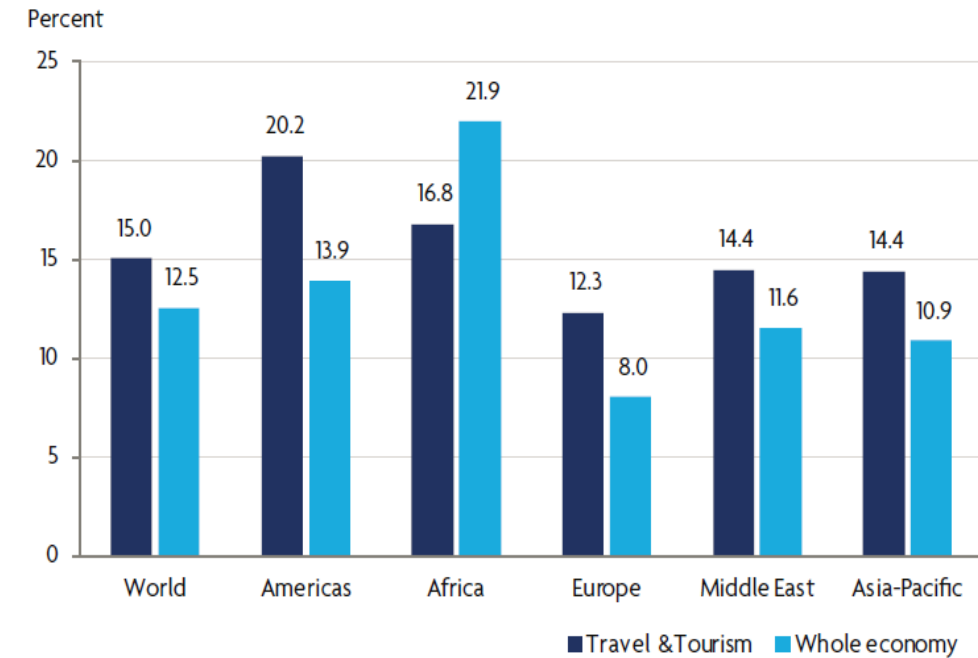


# Youth Employed in T&T

**Total global youth employment supported by Travel & Tourism, by type of impact and year**

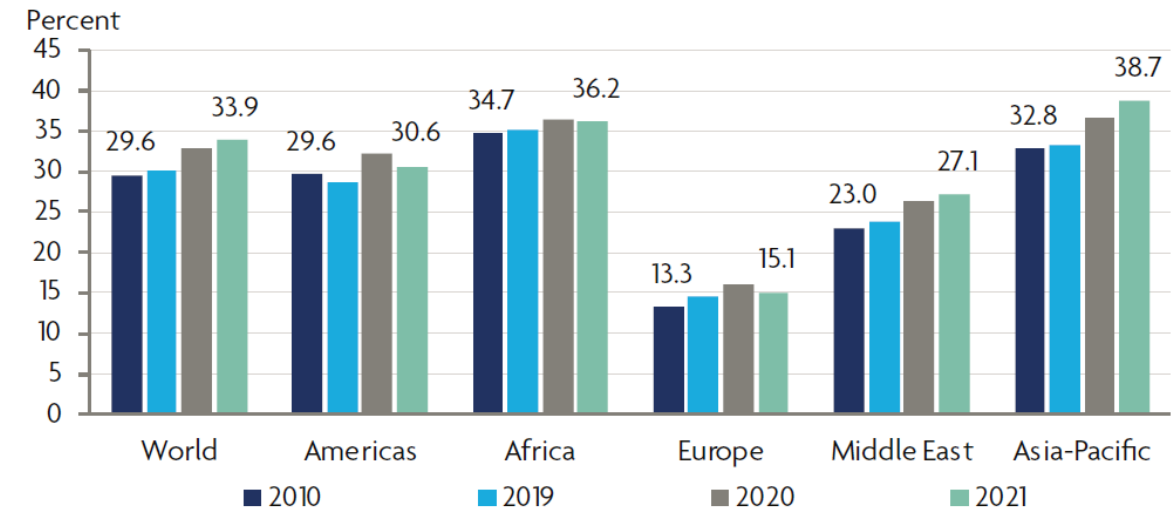


**Youth share of direct employment in T&T and in the overall economy, by region, 2021**



# High Wage Employment in T&T

**Proportion of direct  
Travel & Tourism jobs  
in high-wage sectors  
by region**







# HOTEL SUSTAINABILITY BASICS



Hotel  
Sustainability  
Basics





# Hotel Sustainability Basics (HSB)

## THE CRITERIA

- 12 criteria to implement in 3 years, 8 in the first year (at least one for each area)
- Three categories: Efficiency, Planet and People



Travalyst

Forbes  
TRAVEL GUIDE



Hotel  
Sustainability  
Basics



### Efficiency

Measurement and reduction of energy, water, waste and carbon emissions consumption.

1. Measure and reduce energy use
2. Measure and reduce water consumption
3. Identify and reduce waste
4. Measure and reduce carbon emissions



### Planet

Actions to protect the environment

5. Bedding reuse program
6. Ecological cleaning products
7. Vegetarian options
8. Reduce single-use plastics: stirrers and straws
9. Reduce single-use plastics: eliminate plastic bottles
10. Reduce single-use plastics: include bulk dispensers



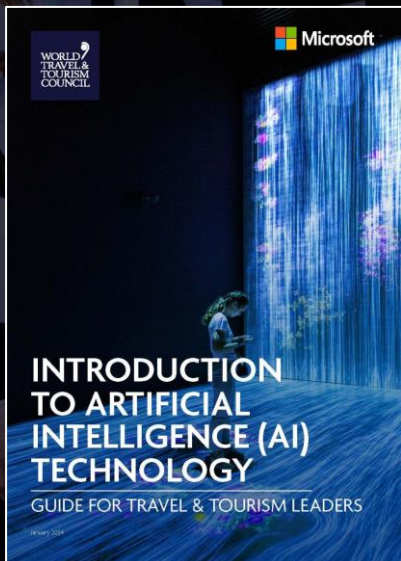
### People / Community

Actions to generate a positive impact in the communities in which the hotels are located

11. Community benefit
12. Reduce inequalities



# Reports & Research



## Introduction to Artificial Intelligence (AI) Technology: Guide for Travel & Tourism Leaders

## Artificial Intelligence (AI) in Action: Use Cases & Impacts of AI in Society, Business and Travel & Tourism



## The Social Impact of Global Tourism

## The Environmental Impact of Global Tourism



## Sustainability Leadership Case Studies / Iberostar: Roadmap for Decarbonisation



# Reports & Research

## Creating Belonging: DEIB in Travel & Tourism



## Sustainable Aviation Fuel



## WTTC-Staff Shortages



## Unlocking Opportunities for T&T Growth in Africa



## Global Retail Tourism Trends and Insights



## Consumer Trends

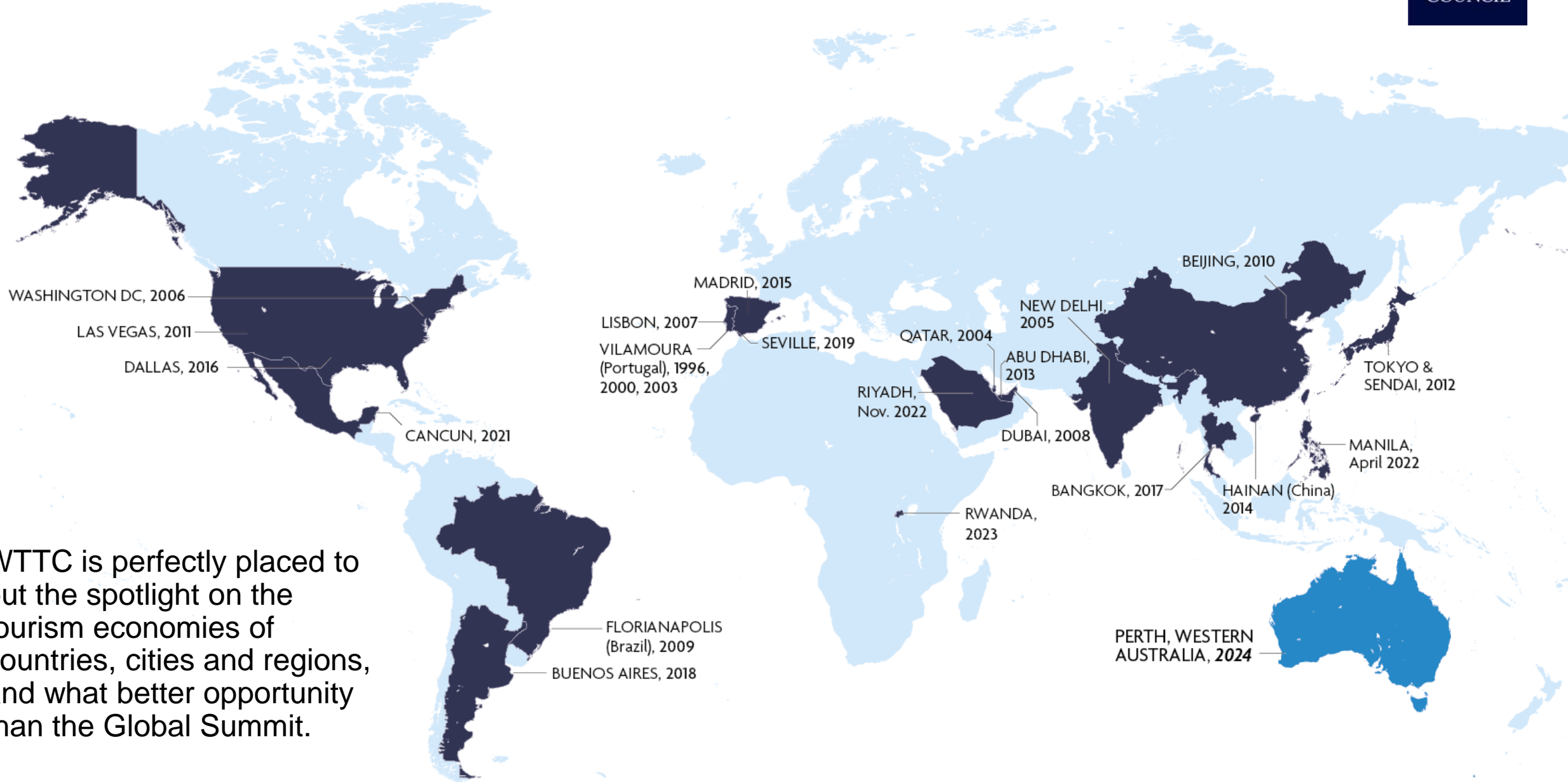




# ACTIVITIES & GLOBAL SUMMIT



# The Global Summit



WTTC is perfectly placed to put the spotlight on the tourism economies of countries, cities and regions, and what better opportunity than the Global Summit.



WORLD TRAVEL & TOURISM COUNCIL

# GLOBAL SUMMIT RWANDA ♦ 2023

Highlights

#GSRwanda

WORLD TRAVEL & TOURISM COUNCIL  
VISIT  
RWANDA



VISIT  
RWANDA

WORLD TRAVEL & TOURISM COUNCIL

# GLOBAL SUMMIT

VISIT  
RWANDA

WORLD  
TRAVEL &  
TOURISM  
COUNCIL



## RWANDA GLOBAL SUMMIT 2023



**900+**

In-Person Attendees



**3,700+**

Virtual attendees



**40+**

Government  
Representatives



**1,300+**

Pieces Of Media



**930k+**

Social Impressions



# WTTC GLOBAL SUMMIT 2024

## Perth, Western Australia

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8 – 10 October





**Routes 2023  
Istanbul, Türkiye**



**ETC Conference  
Tenerife, Spain**



**Members Dinner  
Hong Kong**



**ESR Launch  
Puerto Rico**



**Climate Week  
New York, USA**



**Fitur  
Madrid, Spain**



**Destination France  
Chantilly, France**



**GTEF Forum,  
Macau, China**



**JATA Tourism Expo  
Tokyo, Japan**



**Hotel Sustainability Basics  
ITB Berlin, Germany**



**Member Cruise Dinner  
Shanghai, China**



**WTM Ministers Summit  
London, UK**

# EVENTS 2023-24



# Thank you

26 Feb 2024

Strategic  
Partners:

AMERICAN  
EXPRESS

GLOBAL **+rescue**

وزارة السياحة  
Ministry of Tourism



wttc.org



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